

## CY2009-2013 State Board of Education Strategic Planning/Performance Budgeting Worksheet

<u>Month</u>	<u>Strategic Planning</u>	<u>Performance Reporting</u>	<u>Eight-year Academic Programs Plan (semi-annual cycle)</u>	<u>Budgeting</u>	<u>Proposed Legislation</u>
<b>Jan</b>	-Agencies and Institutions start updating their strategic plan based on SBOE guidance and strategic plan.	-The SBOE reviews NWCCU accreditation results as available.	-Higher Education institutions hold regional meetings and begin drafting a regional plan for academic and professional-technical program offerings over the next 8 years.		
<b>Feb</b>	-Agencies and Institutions continue updating their strategic plans.		- Institutions continue to cooperatively draft regional plans.		
<b>Mar</b>	-Agencies and Institutions finalize their strategic plan updates for submission to the SBOE prior to <b>April</b> agenda cutoff.	-Institutions and agencies revise performance measures and benchmarks to align with strategic plan.	-Institutions (all regions) meet to conduct a statewide needs assessment for academic and professional-technical program offerings over the next 8 years.		
<b>Apr</b>	-SBOE is briefed on next FY legislative appropriations and new legislation as it impacts SBOE governed agencies and institutions. -SBOE reviews and approves updated institution and agency strategic plans. -SBOE receives final DFM strategic plan guidance (for governed agencies and institutions).	<b>-Early-April</b> agencies and institutions submit <u>proposed</u> performance measures/benchmarks (including continued use of current measures, if appropriate) for review/approval by SBOE. (Note: These measures are for the fiscal year beginning July 1.) -SBOE/OSBE receives final DFM performance reporting guidance (for governed agencies and institutions). -SBOE reviews and approves agency and institution <u>proposed</u> performance measures and benchmarks.	-Institutions share their respective draft 8 year plans with OSBE and the other institutions.	-SBOE is briefed on next FY legislative appropriations and new legislation as it impacts SBOE governed agencies and institutions. -SBOE provides <u>budget guidelines</u> (including <u>line items</u> ) to the agencies and institutions.	
<b>May</b>	-Presidents and agency head evaluations.			-Agencies and institutions submit estimated <u>line items</u> to OSBE prior to <b>June</b> Board agenda cutoff. -Institutions and agencies submit	-Agencies and institutions notified to submit legislative ideas and suggestions to OSBE prior to <b>June</b> Board

				8 year strategic operation plans (all funds) to OSBE prior to the cutoff for <b>June</b> Board meeting agenda. The 4-year institutions will also submit 8 year capital facilities and 8 year debt plans.	agenda cutoff.
<b>Jun</b>	-SBOE makes any final adjustments in agency and institution strategic plans.		-Institutions meet to formally present their 8 year plans.	-SBOE provides <u>budget MCO guidelines</u> to the agencies and institutions. -OSBE provides guidelines and budget template to agencies and institutions for MCO submission (prior to <b>August</b> Board agenda cutoff). -SBOE reviews agency and institution <u>line item</u> requests. -SBOE reviews and approves agency and institution <u>line item</u> requests, 8 year strategic operating capital facilities and debt plans.	-SBOE reviews, approves, and provides guidance concerning <u>proposed</u> agency and institution legislative ideas.
<b>Jul</b>	-OSBE submits SBOE approved agency and institution strategic plans (revised if required by the Board) to DFM by the <b>early-July</b> deadline.	-The SBOE reviews NWCCU accreditation results as available.	-Institutions meet to coordinate and finalize their 8 year plans for presentation to the Board in <b>August</b> . -OSBE staff verifies 8 year plans are compatible with institution role and mission, SBOE strategic plan and performance reporting.	-Agencies and institutions submit estimated MCO budget to OSBE prior to <b>August</b> Board agenda cutoff.	
<b>Aug</b>		-Agencies and institutions submit agency and institution performance reports to OSBE in <b>late-August</b> .	-Final 8 year plan for academic and professional-technical program offerings presented to the Board for approval.	-SBOE reviews and approves <u>final</u> budget request for next FY. -Draft budget request input to DFM automated system (by agencies and institutions) with	-OSBE submits legislative ideas to DFM prior to the required <b>early-August</b> deadline. -Governor's Office and DFM review

				<p>a copy of supporting materials sent to OSBE.</p> <p>-OSBE reviews agency and institution budget submissions to ensure compliance with SBOE guidance.</p> <p>-In <b><u>late-August</u></b> all budget documents returned to OSBE for final submission to DFM and LSO.</p>	<p>legislative ideas.</p> <p>-OSBE begins development of approved legislative ideas into draft legislation (as appropriate).</p>
<b>Sep</b>	Board conducts self-assessment.	-OSBE submits approved agency and institution performance reports to DFM by the required <b><u>early-September</u></b> deadline.		-Final budget requests forwarded to DFM and LSO by the <b><u>early-September</u></b> deadline.	-Proposed (final draft) legislation is due to DFM about <b><u>mid-September</u></b> .
<b>Oct</b>	<p>-SBOE reviews Board's draft strategic plan.</p> <p>-SBOE reviews self-assessment and makes recommendations for improvements.</p>	-SBOE reviews performance data from institutions and agencies for the previous year. Review forms the basis for revising strategic plan.		-SBOE strategic planning summit includes financial outlook and impact of the zero-based budgeting initiative.	-Proposed legislation is approved by SBOE. DFM forwards to LSO by <b><u>mid-October</u></b> .
<b>Nov</b>	-Staff develops and finalizes (in collaboration with the agencies and institutions) the next annual update to the strategic plan.	-OSBE updates performance measures to align with the Board's strategic plan.			-Proposed legislation in <b><u>bill format</u></b> returned by LSO to OSBE for review and final changes.
<b>Dec</b>	-SBOE review and approves the annual updated/revision to the Board's strategic plan for the next FY.	-SBOE/OSBE approves performance measures for the Board and OSBE strategic plans. This includes those based on the review of self-assessment.			- <b><u>Early-December</u></b> is the final date for changes to bills (legislative proposals). Bills with substantive changes are resubmitted to SBOE for approval.